



IAPD Report

STEWART ALAN MACDONALD

CRD# 1510190

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i Please be aware that fraudsters may link to Investment Adviser Public Disclosure from phishing and similar scam websites, trying to steal your personal information or your money. Make sure you know who you're dealing with when investing, and contact FINRA with any concerns.

For more information read our [investor alert](#) on imposters.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

STEWART ALAN MACDONALD (CRD# 1510190)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **07/10/2019**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
B	LPL FINANCIAL LLC	CRD# 6413	03/11/2010
IA	GLOBAL RETIREMENT PARTNERS LLC	CRD# 172011	05/30/2019

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **3** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.

Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
IA	INDEPENDENT FINANCIAL PARTNERS	125112	ST. PETERSBURG, FL	07/19/2010 - 04/25/2019
IA	JONATHAN ROBERTS ADVISORY GROUP, INC.	112294	TAMPA, FL	03/20/2009 - 12/21/2009
B	J.W. COLE FINANCIAL, INC.	124583	ST. PETERSBURG, FL	02/20/2009 - 12/11/2009

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative?

No



Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **3** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **GLOBAL RETIREMENT PARTNERS LLC**
Main Address: 4340 REDWOOD HIGHWAY
SUITE B-60
SAN RAFAEL, CA 94903
Firm ID#: 172011

	Regulator	Registration	Status	Date
IA	Florida	Investment Adviser Representative	Approved	05/30/2019

Branch Office Locations

GLOBAL RETIREMENT PARTNERS LLC
275 96th Ave. #4
St. Petersburg, FL 33702

Employment 2 of 2

Firm Name: **LPL FINANCIAL LLC**
Main Address: 1055 LPL WAY
FORT MILL, SC 29715
Firm ID#: 6413

	Regulator	Registration	Status	Date
B	FINRA	Invest. Co and Variable Contracts	Approved	03/11/2010
B	FINRA	General Securities Representative	Approved	07/05/2010
B	Florida	Agent	Approved	03/11/2010
B	New Jersey	Agent	Approved	02/23/2015
B	North Carolina	Agent	Approved	07/02/2013

Branch Office Locations



Qualifications

LPL FINANCIAL LLC
275 96TH AVE N STE 4
ST PETERSBURG, FL 33702



Qualifications



PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 0 principal/supervisory exams, 3 general industry/product exams, and 1 state securities law exam.

Principal/Supervisory Exams

Exam	Category	Date
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No information reported.

General Industry/Product Exams

Exam	Category	Date
B Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
B General Securities Representative Examination (S7)	Series 7	07/02/2010
B Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	08/28/1986

State Securities Law Exams

Exam	Category	Date
B Uniform Securities Agent State Law Examination (S63)	Series 63	07/01/2013



PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **1** professional designation(s).

Chartered Financial Consultant

This representative holds or did hold **1** professional designation(s) that may have been used to qualify as an Investment Advisor representative. Please check with the appropriate designation authority for verification that the designation is still in effect. The contact information for these professional designation authorities can be found on the website for the North American Securities Administrators Association at <http://www.nasaa.org>



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
IA	07/19/2010 - 04/25/2019	INDEPENDENT FINANCIAL PARTNERS	CRD# 125112	ST. PETERSBURG, FL
IA	03/20/2009 - 12/21/2009	JONATHAN ROBERTS ADVISORY GROUP, INC.	CRD# 112294	TAMPA, FL
B	02/20/2009 - 12/11/2009	J.W. COLE FINANCIAL, INC.	CRD# 124583	ST. PETERSBURG, FL
IA	03/06/2008 - 12/31/2008	MONEY CONCEPTS CAPITAL CORP	CRD# 12963	SAINT PETERSBURG, F
B	03/03/2008 - 12/31/2008	MONEY CONCEPTS CAPITAL CORP	CRD# 12963	SAINT PETERSBURG, F
IA	06/19/2007 - 02/05/2008	INTERSECURITIES, INC.	CRD# 16164	ST. PETERSBURG, FL
B	06/12/2007 - 02/05/2008	INTERSECURITIES, INC.	CRD# 16164	ST. PETERSBURG, FL
B	12/16/2004 - 08/18/2006	THE O.N. EQUITY SALES COMPANY	CRD# 2936	ST. PETERSBURG, FL
B	05/23/2003 - 01/03/2005	MONY SECURITIES CORPORATION	CRD# 4386	NEW YORK, NY
B	07/10/2002 - 04/09/2003	NYLIFE SECURITIES INC.	CRD# 5167	NEW YORK, NY
B	02/03/1997 - 06/20/2002	SIGMA FINANCIAL CORPORATION	CRD# 14303	ANN ARBOR, MI
B	02/07/1995 - 12/07/1995	ALLAPREE SECURITIES, INC.	CRD# 30929	PORT RICHEY, FL
B	07/30/1993 - 12/31/1993	FFP SECURITIES, INC.	CRD# 16337	CHESTERFIELD, MO
B	06/19/1992 - 06/21/1993	INTERSECURITIES, INC.	CRD# 16164	ST. PETERSBURG, FL
B	09/26/1989 - 12/11/1990	SECURITIES AMERICA, INC.	CRD# 10205	LAVISTA, NE
B	08/03/1988 - 09/28/1989	BRAUER & ASSOCIATES, INC.	CRD# 18278	ST. PETERSBURG, FL



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
B	09/02/1986 - 02/04/1988	PRUCO SECURITIES CORPORATION	CRD# 5685	

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
05/2019 - Present	Global Retirement Partners LLC	Investment Advisor Representative	Y	St. Petersburg, FL, United States
03/2010 - Present	LPL FINANCIAL LLC	REGISTERED REPRESENTATIVE	Y	ST PETERSBURG, FL, United States
01/1987 - Present	MACDONALD FINANCIAL SERVICES	OWNER/PRESIDENT	Y	ST PETERSBURG, FL, United States
04/2010 - 05/2019	INDEPENDENT FINANCIAL PARTNERS	INVESTMENT ADVISOR REPRESENTATIVE	Y	ST PETERSBURG, FL, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

(1) 04/04/2011 - MACDONALD FINANCIAL - NON-VARIABLE INSURANCE DBA - MACDONALD FINANCIAL - I HAVE BEEN ACTIVE IN EMPLOYEE BENEFIT MARKET BUT WILL BE PHASING THIS OUT (DUE TO HEALTH CARE REFORM). MY GOAL IS TO RE-BRAND WITH HELP OF LIVE OFFICE ADVISOR SQUARE LPL WEBSITE CAPITALIZING ON 25 YEARS OF GOOD WILL. SHIFT FROM HEALTH TO WEALTH. - 85% OF TIME SPENT - ST PETERSBURG, FL

(2) 04/04/2011 - MACDONALD INSURANCE GROUP - MACDONALD INSURANCE GROUP SALES OF EMPLOYEE BENEFIT PLANS GROUP LIFE DENTAL HEALTH SHORT AND LONG TERM DISABILITY AND PAYROLL. - 15% OF TIME SPENT - ST PETERSBURG, FL.

(3) 6/2/2014: NON-VARIABLE INSURANCE - STEWART MACDONALD - SELL LIFE INSURANCE AGENT, ROLE WILL BE TO MARKET LIFE INSURANCE. - 10 HOURS PER MONTH - ST PETERSBURG, FL.

(4) 10/18/2015: stewart and laurie macdonald LLC - Investment Related - 275 96th ave n #4 st., petersburg fl 33702 - Business Entity For Tax/Investment Purposes Only - Started 04/15/2014 - 1 Hour Per Month.

(5) 11/14/2017 - Macdonald Consultants - Investment Related - At Reported Business Location(s) - Insurance Agency - Start Dated 10/31/2017 - 10 Hours Per Month/1 Hour During Securities Trading - Offer employee benefit plans, life, dental disability, medicare, group health and ancillary lines.

(6) 1/26/2018 - Macdonald Planning - Investment Related - At Reported Business Location(s) - DBA for LPL Business (entity for LPL business) - Start Date 1/11/2018 - 160 Hours Per Month/10 Hours During Securities Trading.



Registration & Employment History



OTHER BUSINESS ACTIVITIES

(7) 1/26/2018 - Macdonald Planning - Investment Related - At Reported Business Location(s) - Non-Variable Insurance - Start Date 1/11/2018 - 160 Hours Per Month/10 Hours During Securities Trading - Fixed life and disability, medicare plans, employee benefit plans incl group life dental disability and health.

(8) 5/27/2019 - Global Retirement Partners LLC - DBA: (Hybrid) Global Retirement Partners - Investment Related - At Reported Business Location(s) - Registered Investment Advisor Hybrid - IAR - Started 05/01/2019 - 160 Hours Per Month/80 Hours During Securities Trading - I provide investment advisory services through Global Retirement Partners LLC, an independent investment advisor firm. I started this business activity in 5/01/2019. I expect to spend approximately 160 hours per month on this activity. Please see the advisory firm's Form ADV for more information about its address, the nature of its business, its owners, and its services at <http://www.adviserinfo.sec.gov/IAPD>. The firm is separate from and independent of LPL Financial.

(9) 6/9/2019 - Global Retirement Partners - DBA: (Hybrid) Garnett Retirement Group - Investment Related - At Reported Business Location(s) - Registered Investment Advisor DBA - Started 06/01/2019 - 160 Hours Per Month/8 Hours During Securities Trading - I provide investment advisory services through Global Retirement Partners, an independent investment advisor firm. I started this business activity in 06/01/2019. I expect to spend approximately 160 hours per month on this activity. Please see the advisory firm's Form ADV for more information about its address, the nature of its business, its owners, and its services at <http://www.adviserinfo.sec.gov/IAPD>. The firm is separate from and independent of LPL Financial.



End of Report

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